

## ISU Purchasing Department [PURCH]

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**From:** ISU Purchasing Department [PURCH]  
**Sent:** Monday, September 10, 2012 3:07 PM  
**Subject:** Requisitioning system international insurance function  
**Attachments:** ORMnewsletter2012-08.pdf; CISIverifier.pdf

To: Requisitioning system verifiers

Requisitioning system verifiers now have an additional link on their Web Req-VRFYR menu: *Intl Insurance Application*. The Office of Risk Management (ORM) and the Purchasing Department have collaborated to allow requisitioning system verifiers to create applications for international health insurance and emergency service for business travelers. Attached is the recent ORM newsletter with more information about this program.

Cultural Insurance Services International (CISI) is an international health and emergency services plan for Iowa State University international travel. The CISI plan has been specifically designed for Iowa Regent Universities to cover University business travelers and students traveling abroad. In addition to providing health insurance, the plan will cover medical evacuation and repatriation as well as security evacuations should they become necessary. The CISI plan will pay 100% of covered expenses without requiring a deductible. More information is available at the following Office of Risk Management website link <http://isuabroad.iastate.edu/?go=CISI>.

Also attached is a document with sample screens and instructions for verifiers in using the requisitioning system to process international insurance applications.

***An informational session for requisitioning system verifiers led by Emily Davis of CISI and Lesley Lackore of the Purchasing Department has been scheduled for Friday, September 21, from 10:30-11:30 am in the Cardinal Room of the Memorial Union. You may enroll in this session by going to HRS Training under the employee tab in AccessPlus and signing up for PURCH-CISI International travel insurance applications.***

Questions about the CISI plan may be directed to the Office of Risk Management at 294-7711. Questions about the requisitioning system function may be directed to the purchasing help desk at 294-4860 or [purchasing@iastate.edu](mailto:purchasing@iastate.edu).

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*Lesley Lackore, CPCP*

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P-card help: [pcard@iastate.edu](mailto:pcard@iastate.edu)  
cyBUY help: [cyBUY@iastate.edu](mailto:cyBUY@iastate.edu)  
General purchasing help: [purchasing@iastate.edu](mailto:purchasing@iastate.edu)  
After hours assistance: 515.231.0958  
[www.purchasing.iastate.edu](http://www.purchasing.iastate.edu)

**\*NEW\* INTERNATIONAL HEALTH INSURANCE AND EMERGENCY SERVICE**

Iowa State University has completed an agreement with Cultural Insurance Services International (CISI) to provide basic and emergency medical insurance and security evacuation services for students, faculty, and staff traveling abroad on university business.

**University International Business Travel**

Enrollment in the CISI program is strongly recommended for ISU international business travelers. The cost of CISI coverage is centrally funded for faculty and staff on official ISU business. This program cannot be used for international travel that is not business related.

*Please Note: Faculty, staff and students on official study abroad programs will be automatically enrolled in CISI by the Study Abroad Center and do not need to enroll through AccessPlus.*

**To obtain CISI coverage for international travel (other than a study abroad program):**

1. Approximately three (3) weeks prior to departure, the traveler's departmental verifier must register travel through the University's requisitioning (Web Req) system in AccessPlus.
2. Following the registration for enrollment, the request will be routed to the departmental approver for review.
3. Upon departmental approval, the traveler will receive an e-mail directly from CISI with the following:
  - An insurance card
  - The CISI brochure with claim form
  - A consulate letter verifying insurance coverage (if needed for visa purposes)
  - Access to the CISI web portal



**International Travel Insurance FAQ's**

CISI is **not intended for use in the United States or to replace current U.S. coverage.**

**This coverage does not include trip cancellation, trip interruption, or delayed baggage insurance.**

**Undergraduate International Travel:** All undergraduate students who study or officially travel abroad in association with ISU programs (and those faculty and/or staff who accompany them) **MUST** participate in this plan for the period of time they are out of the country. Information can be found at the Study Abroad site under International Travel.

**SSHIP Exemption:** If the traveler has the Student and Scholars Health Insurance Program (SSHIP) and is traveling independently for academic purposes, contact the ISU Study Abroad Center ([cisi@iastate.edu](mailto:cisi@iastate.edu)) for an exemption to the CISI requirement.

**Travel Companions:** Optional coverage is available at the traveler's expense for accompanying spouse/domestic partner or dependents by submitting an enrollment form found at <http://isuabroad.iastate.edu/?go=CISI> in the "I am a DEPENDENT" section at the bottom of the page.

**Extension of Coverage for Personal Travel:** Those who choose to travel independently directly before/after the university business travel/program may purchase extended coverage directly through the CISI web portal.

# International Health Insurance and Emergency Service

AccessPlus Sample Screens and Instructions:

The screenshot displays the AccessPlus uBusiness interface for an International Travel Insurance Application. The page title is "Web Req-VRFYR- B/C". The user is logged in as "CAMPBELL TISHA" from department "12060". The form is titled "International Travel Insurance Application" and includes the following fields:

- Traveler University ID:** 123456789
- Volunteer:**
- Dept:** 12060
- Last Name:** Lackore
- First Name:** Lesley
- Date of Birth (MM-DD-CCYY):** 01/01/1975
- Gender:**  M  F
- Overseas Contact Phone:** 1234567890123456
- Email:** llackore@iastate.edu
- Business Purpose:** To attend the conference of the International Association of Purchasing Card Professionals
- Travel Begin Date (MM-DD-CCYY):** 09/15/2012
- Travel End Date (MM-DD-CCYY):** 09/23/2012
- Destination Country:** NZ New Zealand

Additional text on the page includes: "Completion of this application initiates enrollment in Cultural Insurance Services International (CISI), an international health and emergency services plan for Iowa State University international travel. Travelers (on University business) incur no cost for the program's premium, coverage and services." and "Optional coverage is available at the traveler's expense for accompanying spouse/domestic partner or dependents. Use the form at the link below: [Enrollment Form for Dependents](#)". A "Submit" button is located at the bottom right of the form.

International travel insurance applications are processed through the requisitioning system by AccessPlus uBusiness users identified as verifiers in that system (Web Req-VRFYR).

In the menu section, select *Intl Insurance: Application* to begin a new international travel insurance application.

The verifier must complete the following fields:

- **Traveler University ID** – enter the 9-digit university identification number of the traveler. If the traveler does not have a university ID, check the box next to **Volunteer**.
- **Dept** – this field will be populated with department number associated with the verifier, but may be changed.
- **Last Name** – enter the last name (surname, family name) of the traveler.
- **First Name** – enter the first name (given name) of the traveler.
- **Date of Birth** – enter the traveler's date of birth, using the MM-DD-CCYY format.
- **Gender** – choose the gender of the traveler; M for male, F for female.
- **Overseas Contact Phone** – enter a phone number where the traveler may be reached while outside the US. Up to 16 digits may be entered; do not use hyphens or parentheses.
- **Email** – enter the traveler's email address.
- **Business Purpose** – enter the business purpose for the traveler's international trip.
- **Travel Begin Date** – enter the date travel will begin, using the MM-DD-CCYY format.
- **Travel End Date** – enter the date travel will end, using the MM-DD-CCYY format.

- **Destination Country** – select the country to which the traveler will be traveling from the pull-down menu. If traveling to more than one country, the verifier may select ‘Worldwide’ or the appropriate continent.

Upon completion of the form, click on the *Submit* button to route the form to the approver. The approver is determined by the department number used on the form, and follows the same routing as requisitions processed through this system. The approver will have immediate access to the form in the E-Forms Approval system, and will receive an email notification of a form to process.

Once notified of an international travel insurance form to process, the approver selects E-Forms Approval under the uBusiness tab in AccessPlus. Click on *Browse Forms: For Approval* to see a summary of the forms available to the approver to process. International travel insurance forms will be E-Form Type REQ (requisition), but the summary line will display INTNL TRVL INS followed by the last name of the traveler, instead of the requisition number and requestor. To view the form, click on the Summary line.

| Form                        | Summary                      | Status | Status Date | Origination Date | Proxy |
|-----------------------------|------------------------------|--------|-------------|------------------|-------|
| REQ 10000115480             | by VANDE VOORT MICHAEL ARDEN | APR    | 06-04-2012  | 09-27-2011       | Proxy |
| REQ 10000113015             | by TERRY ANDY L              | REJ    | 02-07-2012  | 02-07-2012       |       |
| REQ INTNL TRVL INS, SMITH   |                              | APR    | 07-13-2012  | 07-13-2012       | Proxy |
| REQ INTNL TRVL INS, LACKORE |                              | APR    | 07-23-2012  | 07-23-2012       | Proxy |

The approver has the choice of seven buttons at the bottom of the form:

- **Additional Info** – this button is not functional for international travel insurance forms.
- **View Routing** – displays a screen showing the originator of the form (the requisitioning system verifier) and the approver, along with types of action taken, action date and comments. Click on the *Return to form* button to return to the form.
- **Approve** – authorizes the information to be sent to CISI. The traveler will receive an email directly from CISI as described above.
- **Hold** – retains the form in the approver’s *Browse Forms: For Approval* queue. Requires the approver to add a comment before the form can be held.
- **Reject** – denies authorization for the information to be sent to CISI. Requires the approver to add a comment before the form can be rejected. The verifier will be notified of a rejected form by email.
- **Add Comment** – displays a screen to add a comment to a form; required for held or rejected forms. Add the comment to the *Comment* field, then click the *Submit* button to add it to the form. Click on the *Return to form* button to return to the form.

- Add Routing** – displays a screen to add another E-Forms Approval REQ form user to the routing of this form for informational purposes. Enter the last name of the user to add in the *Search* field, then click on the *Slect* button. Use the pulldown menu to select an E-Forms Approval REQ user, then click on the *Submit* button to route the form to that user for review. Click on the *Return to form* button to return to the form.

**ACCESSPLUS**  
About | Logout

Home Student Employee

Enter keyword W3C Web Xact Contact

**e-Forms Approval**

E-Form Type: REQ E-Form Key: [ ]

**View Form**

Business

- Admin cyBUY
- Admin Pcard
- Admin Req
- Cent Sto Ordering
- Cent Store Catalog
- Chem Sto Ordering
- cyBUY (Releaser)
- cyBUY (Reviewer)
- Empl Reimbursement
- Image - Client Tst
- Image - ITS Test
- KC - 3.1.1 (cfg)
- KC - 3.1.1 (dev)
- KC - 3.1.1 (qa)
- KFS cfg (admin)
- KFS cfg (cgb)
- KFS qa
- P-Card Display
- P-Card - Coord.
- P-Card - User
- P-Card ADMIN - CO
- P-Card Cardholder
- Vendor App - PRCH
- Vendor Application
- Web Req - RQSNR
- Web Req V/Dir Ord

\*\* Approval below indicates that this travel is ISU business.

\*\* This transaction is for the traveler to acquire international health and emergency services coverage for university business travel. Please review the information provided below and approve or reject the traveler's business purpose. You are not approving any expenditure of funds, only confirming eligibility for enrollment.

\*\* Business travel eligibility is open to employees, volunteers and students traveling on behalf of ISU.

\*\* Faculty leaders for Study Abroad programs will automatically be enrolled by Study Abroad.

Application Num: 10000123589 Dept: 12060  
 Traveler, Last Name: LACKORE First Name: LESLEY  
 Traveler Contact Phone: 1234567890123456  
 Traveler Email: llackore@iastate.edu  
 Travel Begin Date: 2012-09-15 Travel End Date: 2012-09-23  
 Business Purpose: To attend the conference of the International Association of Purchasing Card Professionals

Destination: New Zealand

\*\* Questions regarding enrollment: call Office of Risk Management 294-7711 or Study Abroad Center 294-6792.

\*\* If you need to modify travel dates or cancel enrollment, please contact Office of Risk Management.

End of form

Additional Info View Routing Approve Hold Reject Add Comment Add Routing